

5.14 PHASE COMPARISON

Introduction

Option 7 from the QUERIES button off the TOOLS menu is Phase Comparison. This option provides the ability to compare versions of numeric data from a statistical period as it is processed across time. For example, a monthly indicator survey may publish January numbers as an Advance publication, publish a revision of the numbers in February, and then publish a final version in March. At any point, the data can be revised. The analysts need to know the scope of these revisions and what is contributing to the differences in the published numbers over time.

Before this option can be used, the survey's parameters must be set up to indicate which phases will be saved and specify which data items will be flagged for phase data capture. (See section 2.16 for detailed instruction on setting up a survey for phase data capture.)

Accessing the Phase Comparison Screen

- Click on the TOOLS button from the StEPS Main Menu.
- Click on the QUERIES button from the Tools Menu.
- Then select Option 7 “Phase Comparison” to display the “Generate Phase Comparison” screen shown as Figure 5.14.a

Figure 5.14a Generate Phase Comparison screen

- The top of the screen displays the survey name, the stat period, and the current date.
- The box labeled “Input/Output” is used to format the query results. The options are:

Phase Code

3-character code identifying the phases that are available for analysis. Possible entries are:

ADV - Advanced
PRL - Preliminary
1ST - First Revision
2ND - Second Revision
3RD - Third Revision
4TH - Fourth Revision
PUB - Final

As explained above, data will not be available for a phase, if the survey setup parameters did not tell the StEPS system to save the data for that phase. As a

result, you may see only a subset of the possible codes – those phases that were flagged for phase data capture.

Phase Stat Period

Not correctable from this screen. To change the stat period, go to the USER SETUP screen, available from the StEPS Main Menu. This stat period ID reflects the stat period you are currently processing.

Save Output Permanently

Click on the radio button to save the results as a data set. When button is clicked, you can enter a data set name in the data entry box. For a list of existing data sets, click on the square by the data entry box. If you select an existing data set, a message will ask you if you want to overwrite it.

Result Display

Click on the radio button to send the output to a printer, to display the output on the screen, or to not display an output. The “Do Not Display” option is used when the results are being saved as a data set. If you select “Printer,” you have the option of entering a printer location or selecting a printer from a picklist by the Printer data entry box.

- The box labeled “Result Filtering” allows you to narrow the amount of data displayed. Its options are:

Filter Results

Click on the radio button to indicate that you want to filter your data. Then click on one or more buttons to select the version of the data you wish to compare:

Reported
Edited
Adjusted
Weighted

Mode

Allows you to limit the amount of data displayed or saved to a data set. The options are:

By Top Differences - Displays those cases with the largest difference in absolute values between phases. If selected, the box to the right of this option will ask for the number of differences to display. If you enter 20, the screen will display the 20 items with the greatest differences across the

phases.

By Ratio -

Displays cases with differences that fall outside of a ratio to specify in the boxes on the right-hand side of the screen.

- The box labeled “Choose BY Variables” sorts the output listing into groups based on the “BY” variable. For example: If you select “Action” as a “BY” variable, the listing will put all cases that have had some type of action during the phase comparison period first. All those cases with an “A” for Add will be at the top of the listing. Then all those cases with a “D” for Delete will be listed – and so on through the action codes. Cases that have no action code will be listed following the Action cases.
 - To select a variable, highlight the variable name in the left-hand box and click the right-pointing single arrow beneath the box. The variable name will appear in the right-hand box. Hold down the CTRL key to select more than one, then click the single right-facing arrow under the box. If more than one variable is selected, they will be sorted in alphabetical order.
 - Each variable for the sort must be chosen separately. To select ALL the variables click the double right-pointing arrows under the box.
 - To deselect a variable, highlight its name in the right-hand box and click on the single left-pointing arrow. To clear ALL selected variables, click on the double left-pointing arrows.
- The box labeled “Choose Items,” allows you to select the data items to analyze. The list of items that were set up for phase data capture appear in the left-hand box. To select items individually, highlight the name in the left-hand box, then click the single right-pointing arrow beneath the box. To select all available items, click the double right-pointing arrows. As with choosing the BY variables, you can deselect an item by highlighting it and clicking the left-pointing arrow. To clear ALL selected items, click the double left-pointing arrows.
- The box labeled “Limit IDs” allows you to analyze all IDs (the default) or to limit the number of IDs chosen based on either a WHERE clause or a previously defined selection set. (See section 4.1 on creating and saving a selection set and using the WHERE clause option.) Click on the box by the Selection Set data entry area to see a list of available selection sets. If you want to use a WHERE clause, either type your condition clause into the available data entry box, using correct SAS syntax, or click on the box above the WHERE clause data entry area to select from a list of saved WHERE clauses.

Note: You cannot access the standard StEPS WHERE clause point-and-click screen from this option. If you need help creating your WHERE clause, you must go to one of the Review and Correction options that link to the WHERE clause screen (e.g., Review and Correction option 1 or option 3), create your clause, save it, then access it from the Phase Comparison

screen.

The buttons at the bottom of the screen allow you to run your query immediately, to run it in batch mode, or to run it in the background. (See section 5.2.4 for a detailed description of these modes.)

You can save your phase comparison settings by using the EDIT pmenu option.

- a. Click EDIT.
- b. Select “Save Current Settings.”
- c. A box will appear stating that your setting will be store in USERLIB.PHSCMP.SETTINGS and asking you to name your file.
- d. Enter a name and a description for your settings.
- e. Press F2 or click the button to save.

Once your have saved your settings, you can use the “Load Stored Settings” option from the EDIT pmenu option. Click on the name of the settings to retrieve, then click the LOAD button.

Viewing the Phase Comparison Query Results

If you send the results to your screen, you will see them displayed on the same screen that is used for the “Browse One Data Set” queries, shown as Figure 5.14.b.

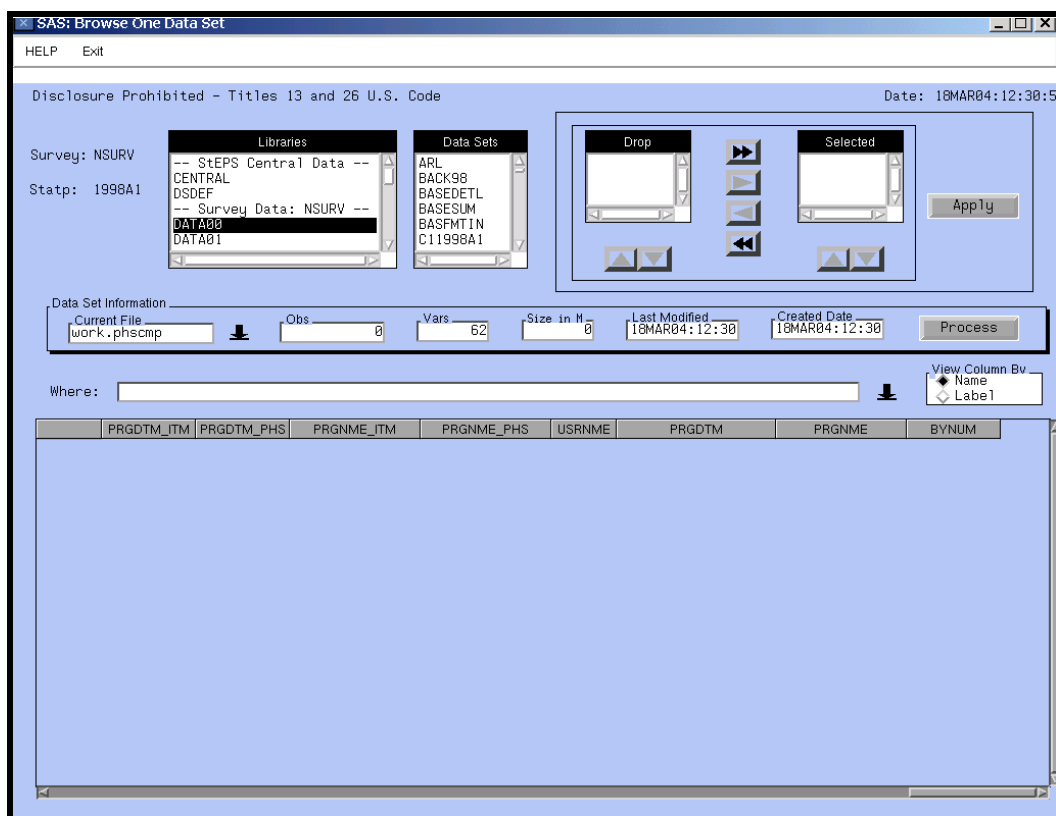


Figure 5.14b Browse One Data Set Screen used for phase data comparisons

The top of the screen displays the name, stat period, and date. The “Library” box shows that the comparison was run using the DATA00 library. No listings are highlighted in the “Data Set” box because the items selected for comparison are found in multiple data sets. The current file is “work.phscmp.”

The IDs and items that show a difference across the phase will be displayed in the data area at the bottom of the screen. The column headings will depend on the options selected. In general they will be:

- ID
- Item Name
- Phase Name (if multiple phases have selected for analysis, the listing will be sorted with the earliest phase first)
- Original value for Item in that Phase
- Adjusted value for Item in that Phase
- Data flags
- 2nd Phase Name (if any)
- Original value of Item in Additional Phase
- Adjusted value of Item in 2nd Phase
- Data flags
- Date, time, and user running the query.

Each item will be on a separate line. The lines will be sorted by a “BY” value if one was specified. Otherwise they will be sorted by ID, then by Item Name within that ID.

If the listing is too long to be useful, return to the screen shown as Figure 5.14a and specify filters for the result, then run the query again.

P-Menus

Generate Phase Comparison screen

P-Menu	Options	Function
EDIT	Save Current Settings	Allows user to name and save savings entered for phase comparison
	Load Stored Settings	Loads previously saved settings
HELP	Browse Data Help (F1)	Display HELP information on using the Browse Data screens.
	WhoamI (F7)	Display user default and systems information
EXIT	Exit (F3)	Exit to previous screen.

Browse data screen

P-Menu	Options	Function
HELP	Browse Data Help (F1)	Display HELP information on using the Browse Data screens.
	WhoamI (F7)	Display user default and systems information
EXIT	Exit (F3)	Exit to previous screen.